



Board of
Examiners

Update

July 2004

2004 Award Applications

A total of 60 organizations have applied for the 2004 Malcolm Baldrige National Quality Award (MBNQA). Award recipients will be announced in late 2004. Eight manufacturing companies, five service companies, eight small businesses, seventeen education organizations, and twenty-two health care organizations sent in applications by the May 27 deadline.

2004 Examiner Training

Congratulations to the 2004 Board of Examiners! This year's board is composed of 533 members, including 184 new Examiners, 219 returning Examiners, 90 Senior Examiners (including 32 new Seniors), 31 Alumni, and 9 Judges. Examiners attended one of the three-day training sessions held at the National Institute of Standards and Technology (NIST) in Gaithersburg, Maryland, during the four weeks in May. In addition, new Examiners arrived a day early for orientation, and Senior Examiners also came early to receive their training on leading consensus and site visit teams. We were fortunate to have a special guest from the Indonesian quality award program join us for the Examiner training sessions.

Significant changes to the training this year included the addition of a webcast orientation session for the training prework; a mentoring program; and a self-paced, on-line course designed to offer background on the Award Program. We also added more cooperative learning or "mini" exercises to the training sessions themselves to increase the interaction between the facilitators and Examiners.

In addition, we provided Examiners with CEU (Continuing Education Unit) letters in the certificate folders that they received at the end of training. These folders also contained a formal certificate and a personalized press release that Examiners can use. Moreover, the American Society for Quality (ASQ) is now accepting photocopies of Examiner training certificates as validating documentation for receiving ASQ recertification units. (Examiners are cautioned not to lose these certificates because NIST cannot replace them.)

We also changed the official hotel for the training sessions from the Marriott Washingtonian to the Hilton Washington DC North. The Hilton, which is located near the NIST campus, offered us a much more competitive rate (\$105 per night versus \$149 per

night at the Marriott). The Hilton also charged us less for the Wednesday evening dinners. As a result, we estimate that we saved between \$40,000 and \$50,000 for the MBNQA Foundation, which enabled us to partially offset the cost associated with increasing the size of the board.

We extend a special thanks to the Judges, Alumni, and Senior Examiners who served as facilitators for the 2004 training sessions. The facilitators for the New Examiner Orientation were Jim Beckham, Gary Floss, Laura Huston, David Jones, Brian Lassiter, John Latham, Jerry Massegee, and Joe Muzikowski. The Examiner Preparation facilitators were Diane Akers, Roy Bauer, Jim Beckham, Maryann Brennan, LaWanda Burwell, Margaret Byrnes, Debbie Collard, Clif Conner, Ray Emery, Mara Fellhoelter, Harry Furukawa, Gretchen Gemeinhardt, Laura Huston, John Jasinski, Nancy Jokovich, Cheryl Jones, David Jones, Dan Jordan, Brian Lassiter, John Latham, Jeff Lucas, Kay Kendall, Jerry Massegee, Joe Muzikowski, Deb Myers, Harry Reedy, Michael Rosenblatt, Maureen Travalini, and John Vinyard. The Senior Training facilitators were Roy Bauer, Kay Kendall, Deb Myers, and Harry Reedy.

2004 Case Study

This year's case study features the Sandy Hill School District (SHSD), a fictitious K-12 district, the largest in its state. Examiners and Alumni attending the 2004 Examiner Preparation Course evaluated the SHSD case study, which provided many valuable lessons as a result of their discussions. The case demonstrates the form and content of an actual Award application in the education sector by providing information requested in the seven Categories of the 2004 Education Criteria for Performance Excellence. This year's Case Study Writing Team was challenged to develop a case study focused on a large, highly diverse school district, operating in an environment that includes federal education mandates and ever-evolving technology. SHSD encompasses urban, suburban, and rural communities and has a growing English as a Second Language (ESL) student segment and 75 percent disadvantaged students in its Region 3. Not all Criteria requirements are addressed well in the case study; because the main purpose of the case study is to familiarize Examiners with the Baldrige Criteria, gaps reflect opportunities for improvement

that Examiners could encounter in evaluating an actual Baldrige Award application.

Case study authors were Maryann Brennan (co-team leader), John Jasinski (co-team leader), LaWanda Burwell, Kathy Jenson, Ronald Marafioti, Sharon Miletich, Rex Mobley, and Jerry Rampelt. Kay Kendall served as technical editor, providing editorial comments about case study content. M. Nicheole Amundsen, Cheryl Crawley, Gary George, Terry Holliday, Deborah Manzo, Diane Rivers, and Rosemarie Stocky provided expertise in the education sector and on Baldrige Criteria content.

A Consensus Team evaluated and scored the SHSD application to serve as a baseline for Examiner training. The Consensus Team comprised Jeffrey Lucas (team leader), Diane Akers, Margaret Byrnes, Ray Emery, Gretchen Gemeinhardt, Cheryl Jones, Deborah Myers, and Michael Rosenblatt. Nancy Jokovich also served as the scorebook editor. We appreciate the many volunteers who work so hard to support the Baldrige National Quality Program (BNQP).

2004 Case Study Packet Availability

The 2004 Case Study Packet will be available on the BNQP Web site (www.baldrige.nist.gov) by July 12. Featuring material used in the 2004 Examiner Preparation Course, the packet will be of special interest to any organization, especially any educational organization, committed to performance excellence. In addition to the "Sandy Hill School District Case Study," the packet includes an "Executive Summary," the "Sandy Hill School District Scorebook," the "Sandy Hill School District Feedback Report," and the "Handbook for the Board of Examiners." The packet is used in conjunction with the "2004 Education Criteria for Performance Excellence" and the "2004 Scorebook for Business, Education, and Health Care" (also available on the Baldrige Web site) to illustrate the 2004 MBNQA application and evaluation processes. In addition to their use in Examiner training, Case Study Packet materials also are used by state and local quality award programs, organizations doing self-assessments, and potential applicants for the Award.

Alumni Program

Historically, Alumni Examiners have been defined as Examiners (including Senior Examiners and Judges) who have served on the Board of Examiners for four or more years. This year, the definition was revised to

increase the length of service required to be an Alumni Examiner to six years. The trained 2004 Alumni will serve as an emergency pool of Examiners for all three stages of the evaluation process. They will likely be asked to evaluate an application at Stage 1 and to work with an Examiner during the Stage 1 feedback report process. In addition, Alumni Examiners may be asked to participate in a number of other tasks such as reviewing training materials or representing the Award Program as ambassadors.

Just-in-Time Training for Consensus and Site Visits

Informative tutorials and reference materials will be placed on the Baldrige Program's Examiner Preparation Resource Center Web page (www.baldrige.nist.gov/Examiner_Resources.htm) this summer to address the concepts and processes associated with the consensus and site visit stages of evaluation. These helpful and timely resources will be available "just in time" (in July and September) for Examiners to prepare for the consensus and site visit review stages.

Three New Overseers Appointed

George Benson, Lynn Harker, and Fred Palensky have received appointments for three-year terms to the 2004 Board of Overseers from Secretary of Commerce Don Evans. The Board of Overseers advises the Department of Commerce on the Baldrige National Quality Program. The board is appointed by the Secretary of Commerce and consists of distinguished leaders from all sectors of the U.S. economy.

George Benson is the Dean of the Terry College of Business at the University of Georgia. Lynn Harker is the President and CEO of Woodland Furniture, LLC, in Idaho Falls, Idaho. Fred Palensky is the Executive Vice President of Safety, Security, and Protection Services Business at 3M Corporation.

Also serving on the 2004 board are William Allyn, Chairman and CEO, Welch Allyn Ventures, and President, Welch Allyn, Inc.; Janet Corrigan, Director, Board on Health Care Services, Institute of Medicine; Julia Gabaldon, President/CEO of Quality New Mexico; Thomas Houlihan, Executive Director, Council of Chief State School Officers; James Melsa, Dean of the College of Engineering, Iowa State University; Roger Raber, President and CEO, National Association of Corporate Directors; Jim Rout, President, Jack Morris Auto Glass; David Spong, recently retired President, Aerospace Support, Integrated Defense Systems, The Boeing Company;

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and Kathleen Waltz, President, Publisher, and CEO of Orlando Sentinel Communications. David Spong serves as Chair of the 2004 Board of Overseers.

Judges' Survey Results

Each year, the MBNQA Panel of Judges assesses Award applicant satisfaction with the Award process, the Criteria for Performance Excellence, the feedback reports that applicants receive, and applicant interactions with the NIST/ASQ staff. The panel uses this customer feedback to recommend process improvements. Fifty-four percent (37 of 68) of the 2003 Award applicants returned the survey.

Ninety-four percent of this year's respondents indicated that they were satisfied or very satisfied with the MBNQA process overall. This rating is equivalent to the all-time high rating of 95 percent in 2001. In general, respondents felt the Award process helped them to focus and prioritize their improvement efforts. The respondents also felt the Award process provided other benefits. For example, one respondent wrote, "Applying for the Award causes acceleration in organizational improvements that I have found no other way to achieve."

The main challenge for applicants new to the process seemed to be the complexity of the Award process and feedback. To address these concerns, BNQP offers an organization the chance to nominate one of its senior members for the Board of Examiners if the organization applies for early eligibility certification. We hope this will promote a better understanding of the Criteria for Performance Excellence and the Award process.

Sixty-three percent of respondents indicated that their organizations would definitely reapply for the Award next year. This is an increase from 35 percent in 2001 and 55 percent in 2002. When asked why they intended to reapply, respondents said, "It is definitely worth the hard work" and "Baldrige has become our primary engine for improvement." In a similar vein, 72 percent of respondents indicated that they would definitely recommend to a colleague in another organization that they apply for the Award. Seventy-two percent of respondents also indicated their organization had participated in a state or local award program, and 69 percent indicated their organization had employees involved in a state or local award program.

Ninety-two percent of respondents indicated that they were satisfied or very satisfied with the clarity of the Criteria. This was the highest satisfaction rating in the seven years of the survey. Also, 94 percent of respondents were satisfied or very satisfied with the relevance of the Criteria in improving their organiza-

tions' performance. This is equivalent to the 97 percent satisfaction rating in 2002.

Although many applicants indicated they would like to see the final feedback report sooner, 80 percent of respondents were satisfied or very satisfied with the relevance and importance of the feedback report in helping their organization in its continuous improvement efforts, and 77 percent were satisfied or very satisfied with the value of the feedback report relative to their investment in participating. Finally, 89 percent of respondents felt the feedback report was objective and free from bias.

Satisfaction with assistance from NIST and ASQ remains high. For example, 100 percent of respondents indicated that their calls were returned promptly and answered effectively by both NIST and ASQ.

2004 Workshop for State and Local Quality Award Programs

On Monday and Tuesday, July 26–27, 2004, BNQP will host the annual Workshop for State and Local Quality Award Programs at NIST. The workshop has been scheduled to coincide with Improvement Day on Wednesday, July 28, to encourage attendance at both events. Anne Cutrumbes of the Granite State Quality Award (New Hampshire), Tom Mauro of the Colorado Performance Excellence Award, and Liz Menzer of the Wisconsin Forward Award comprise this year's Workshop Planning Team.

Seven state award programs will be recognized for being homes to recipients of both their state award and the 2003 Baldrige Award: The Tennessee Center for Performance Excellence (Caterpillar Financial Services Corporation U.S., Nashville, Tennessee, 1999 state recipient, 2003 Baldrige Award recipient); The Lincoln Foundation for Performance Excellence (Community Consolidated School District 15, Palatine, Illinois, 1999 state recipient, 2003 Baldrige Award recipient); California Council for Excellence (Boeing Aerospace Support, Southern California, 2002 state recipient, 2003 Baldrige Award recipient); Lancaster Chamber of Commerce and Industry (Stoner, Inc., Quarryville, Pennsylvania, 1995 state/local recipient, 2003 Baldrige Award recipient); Excellence in Missouri Foundation (Boeing Aerospace Support, St. Louis, Missouri, 2002 state recipient, 2003 Baldrige Award recipient); Kansas Award for Excellence (Boeing Aerospace Support, Wichita, Kansas, 2002 state recipient, 2003 Baldrige Award recipient); and Governor's Sterling Award (Boeing Aerospace Support, Ft. Walton Beach, Florida, 2003 state recipient, 2003 Baldrige Award recipient).

Questions may be addressed to the Workshop Planning Team or to Barbara Fischer at BNQP (phone: 301-975-8942 and e-mail: barbara.fischer@nist.gov).

2004 Improvement Day and Call for Comments

The Baldrige Program's annual Improvement Day is coming July 28, 2004. While you can always submit your comments on any topic related to the Baldrige Program, Improvement Day is an opportunity to have your comments considered prior to the review of the Criteria for Performance Excellence. Comments may address, but are not limited to, the Criteria for Performance Excellence; the Award process including the Baldrige Award Application Forms, training for Examiners, Program outreach, e-Baldrige, "Are We Making Progress?", and "Are We Making Progress As Leaders?"; possible new products and services; and other Program activities. We invite you to join us and gather with other interested people to discuss suggested modifications.

The Call for Comments Web page and on-line registration can be accessed from www.baldrige.nist.gov. For travel planning purposes, Improvement Day follows the State and Local Workshop on July 26 and 27. If you have questions or need additional information, please contact Mary Bostwick at 301-975-4280 or Cassandra Ellis at 301-975-8558.

2004 Regional Conferences

Registration is now open for the 2004 Baldrige Regional Conferences. This year's conferences will take place on September 10 at the Marriott Chicago Oak Brook, Oak Brook, Illinois, and September 30 at the Adam's Mark, San Antonio, Texas. The conferences are being jointly sponsored by the Baldrige Program and the Oklahoma Quality Award; the Lincoln Foundation for Performance Excellence (Illinois); the Texas Award for Performance Excellence; and the Memphis Area Chamber of Commerce, The Mid-South Quality Productivity Center (MSQPC)—The Quality Center.

Both conferences will feature keynote presentations from the senior leaders of the following 2003 Award recipients—Medrad, Inc.; Boeing Aerospace Support; Caterpillar Financial Services Corporation U.S.; Stoner, Inc.; Community Consolidated School District 15; and Saint Luke's Hospital of Kansas City—as well as concurrent and town hall sessions featuring current and past Baldrige Award recipients. Also, preconfere-

nce workshops on getting started with the Baldrige Criteria will be offered September 9 in Oak Brook and September 29 in San Antonio.

For more information, including a complete roster of speakers, visit the BNQP Web site at www.baldrige.nist.gov/2004_Regionals/Regionals.htm.

Sister Mary Jean Ryan Speaks to the NIST Visiting Committee

On Tuesday, June 8, Sister Mary Jean Ryan, President and CEO of SSM Health Care and former Baldrige Overseer, inspired the NIST Visiting Committee on Advanced Technology (VCAT) and NIST's Senior Management Board with a presentation on the impact of the Baldrige process. In 2002, SSM Health Care became the first health care organization in the country to receive the Malcolm Baldrige National Quality Award.

Sister Mary Jean shared how SSM Health Care has used the Baldrige Criteria and a combination of continuous improvement concepts to push the organization out of its comfort zone to achieve exceptional results. These improvements include reducing employee turnover from a rate of 21 percent to 13 percent, well below the national average for this sector. Additionally, SSM Health Care has seen remarkable improvements in its financial performance, patient safety data, clinical outcomes, emergency department response times, and patient satisfaction.

For more than a decade, SSM Health Care took on a journey of continuous quality improvement involving both system-wide and individual organizational efforts. Sister Mary Jean noted that a significant gap was the lack of a single mission statement for the entire organization. Initially, SSM Health Care had 21 pages of mission statements—single-spaced—across the system. She said that this was a clear indication that the efforts of the organization were not focused. So in 1998, SSM Health Care began a year-long process to develop a single mission statement and a clear set of values. Nearly 3,000 employees at every level of the organization and from every one of its entities worked together to reduce the mission statement to 13 words—short by design. As Sister Mary Jean said, "the best thing about [the concise mission statement] is that it was discovered from within."

NIST's VCAT and Senior Management Board members applauded Sister Mary Jean for sharing the SSM Health Care story, and they expressed their appreciation for her outstanding presentation.

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SSM Health Care, based in St. Louis, Missouri, is one of the largest Catholic health care systems in the country. The system owns, manages, and is affiliated with 20 acute care hospitals and three nursing homes in four states: Missouri, Illinois, Wisconsin, and Oklahoma. Nearly 5,000 affiliated physicians and 23,000 employees work together to provide a wide range of services. In addition, SSM Health Care operates rehabilitation and pediatric services, long-term and residential care facilities, and hospices and home health agencies, as well as physician practices, ambulatory care centers, professional office buildings, shared services, and health-related businesses, including information systems.

Baldrige Staff and Examiners On the Road

Members of the Baldrige staff frequently address a number of different conferences and assist with celebrations associated with presenting state and local program awards to recipients. For example, some recent state and local award events have included those in Florida and Lancaster, Pennsylvania. Recent conferences or events where staff have spoken include the American Society for Training and Development (ASTD) Expo and Conference in Washington, D.C. and The Summit at the Juran Center in Minneapolis.

Upcoming events where BNQP will exhibit include the National Association of College and University Business Officers' National Meeting in Milwaukee, the American Chamber of Commerce Executives and National Association of Marketing Directors' Conference in Orlando, the American Society of Association Executives in Minneapolis, the Quality Colloquium at Harvard University in Boston, and the National Association for Healthcare Quality Education Conference in Orlando.

Recently, Examiners have assisted BNQP staff at conferences. A hearty "thank you" is sent to Mike Rosenblatt and Sharon Muret-Wagstaff for their efforts at the National Patient Safety Foundation's Patient Safety Congress in Boston as well as to Jo McLaughlin, Michael Novak, and Sunil Sinha for their assistance at the ASTD Expo and Conference. We also appreciate Kathy Free's recruitment efforts to help us staff the Baldrige exhibit at this conference! You can keep track of future events where the Baldrige Program will present or exhibit at www.baldrige.nist.gov/BNQP_Exhibit_Schedule.htm.

Slide Set and Other Materials Available to Current and Former Examiners

The 2004 BNQP Slide Set and Frequently Asked Questions CD was provided to all current Baldrige Examiners at Examiner training in May. It contains ten different presentations (with speakers' notes). These presentations can easily be tailored for your use, depending upon your audience. The presentations include a Program Overview, Program Impacts, and a greatly expanded Key Excellence Indicators module that contains many examples of excellence exhibited by former Baldrige Award recipients.

Many former Baldrige Examiners continue to play a vital role in helping to spread the word about the Baldrige Program through participating on panels, giving presentations, distributing Baldrige Program materials, writing articles, and encouraging submission of applications for the Award and for the Board of Examiners. For this reason, we will also make the Slide Set CD available upon request to former Examiners. We thank you for your important contributions to the mission of the Baldrige Program!

All major Program documents also are available in bulk quantities upon request. Videos available for your use are "A Journey Worth Beginning," addressing the value of applying for the Malcolm Baldrige National Quality Award, and "A Uniquely Rewarding Experience," focusing on the benefits of being a Baldrige Examiner.

Please contact the Outreach and Communications Team at 301-975-2036 if you need materials for a speaking engagement or would like to use the portable tabletop exhibit. Remember to fax back your completed Examiner Presentation Tracking Form (located on the slide set CD) in order to be recognized for your contributions in future issues of "Update" and to let us know what groups you have reached.

Please note: The webcast orientation "Examiners As Ambassadors" that was announced at Examiner training has been posted on the Web at www.baldrige.nist.gov/Outreach.htm.

Staff News—NIST

Barry Diamondstone, the Deputy Director of BNQP, will retire July 2 after 33 years of government service. Barry joined the Baldrige Program in 1994 and has been influential in ensuring both the continuing success and positive reputation of BNQP. Barry has led the operations of the Program and has been instrumental in the transition to a team-based structure with a culture of continuous learning. Barry was responsible for development and has managed this structure to maximize the productivity and customer focus of the Program while at the same time enhancing individual contributions. In addition, he was actively involved in the expansion of the Baldrige Award categories to include the education and health care sectors and in the development of the Education Criteria for Performance Excellence. Barry coordinated the creation of the BNQP training rooms and the remodeling of the BNQP offices.



*Barry Diamondstone, BNQP
Deputy Director,
Retiring July 2, 2004*

Barry started his career at NIST in 1971, after receiving his bachelor of arts and master's degrees from the State University College at Buffalo, and worked as an analytical chemist for ten years. From 1982 to 1990, he served as the Deputy Chief of the Inorganic Analytical Research Division, as a Program Analyst in the Office of the Director of NIST, and as the Deputy Director of the Center for Analytical Chemistry before assuming the position of Deputy Director of the Chemical Science and Technology Laboratory in 1990.

Barry is a past president of the Analytical Laboratory Managers Association (1992), member of Sigma Xi, past member of the Board on Chemistry and Public Affairs of the American Chemical Society, past chair of the External Advisory Board of the Southeastern University and College Coalition for Engineering Education, and current committee member of the Montgomery County Business Roundtable for Education.

In 2002, Barry received the Department of Commerce Silver Medal for Exceptional Service. It is bestowed for "exceptional performance characterized by noteworthy or superlative contributions that have a direct and lasting impact on the Department." The award recognized Barry's leadership and emphasis on continuous quality improvement.

Barry's time and dedication to the Baldrige Program are much appreciated, and he will be missed not only by Harry and all the Program staff, but also by the many friends of the Baldrige Program. We wish him the best.

Jamie Ambrosi has been named the Acting Deputy Director for the Baldrige Program as of July 3, 2004, following the retirement of Barry Diamondstone. Jamie joined the Baldrige Program in August 1999. Since that time, he has been a member of the Outreach and Communications Team and the Examiner and Staff Development Team. He has led several major projects on these teams including the presidential Award



*Jamie Ambrosi, BNQP
Acting Deputy Director,
Effective July 3, 2004*

ceremony, the annual Regional Conferences, the Examiner training curriculum, and Examiner training logistics. He also has given numerous external presentations on the benefits of using the Criteria for Performance Excellence. These include the preconference workshops at the Regional and Quest for Excellence conferences, a presentation at ASQ's Quality Congress, and presentations at the Wisconsin and New Hampshire state quality award program conferences. Before joining the Baldrige Program, Jamie worked at the Department of Agriculture's (USDA) Animal and Plant Health Inspection Service, where he held several marketing and public affairs positions and was the national coordinator of a USDA public affairs campaign.

Jamie has a bachelor of arts degree in political science from the University of Connecticut and a master's degree in general administration from the University of Maryland. He is currently a member of

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the board of directors of the Family Services Agency, a nonprofit organization based in Gaithersburg, Maryland, and he has served on the boards of several other nonprofit organizations. In his free time, Jamie enjoys being with his wife, Vidya, and his two children.

Marti Jackson, a writer/editor on the BNQP staff, will retire July 2, ending 20 years of federal service, five of which were with the Baldrige Program. Marti came to BNQP in July 1999 with extensive experience in promotional writing and technical editing. Since joining the Publications Management Team, she has provided support to case study development and managed the production of several editions of

the “Criteria for Performance Excellence” booklet, including working on a team to index the booklet and promoting user friendliness with the addition of key-word highlighting. In addition, Marti has contributed to several CEO Issue Sheets, participated in all three stages of the Award process, and traveled for Baldrige on outreach efforts. Marti, who served for two years as team leader for the Publications Management Team, added, “Working for Baldrige was one of the most satisfying jobs of my career. I will miss many special people and being a part of such an important program that really is making a difference.” BNQP will miss Marti too but wishes her well on her retirement!

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